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## Tracking Trouble: Managing Primo Bug Reports

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A decorative graphic on the left side of the slide consists of white and light blue lines resembling a circuit board or a network diagram. These lines are vertical and horizontal, with small circles at various points, creating a stylized, abstract pattern.

# TRACKING TROUBLE: MANAGING PRIMO BUG REPORTS

CARIN YAVORCIK, ELECTRONIC RESOURCES LIBRARIAN  
CONCORDIA UNIVERSITY - PORTLAND

# OVERVIEW

- Types of problems
- Our solution: Tracking Spreadsheet
- Useful formulas
- Statistics
- Future directions



*Chester has graciously agreed to add a little levity to this presentation.*




ARTICLE / multiple sources exist. see all

## On Writing, Technical Communication, and Information Technology: The Core Competencies of Technical Communication.

Hart - Davidson, William

Technical Communication: Journal of the Society for Technical Communication, 2001, Vol.48(2), p.145-55

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Rye, O. S.  
Archaeology & Physical Anthropology in Oceania, 1 July 1976, Vol.11(2), pp.106-137

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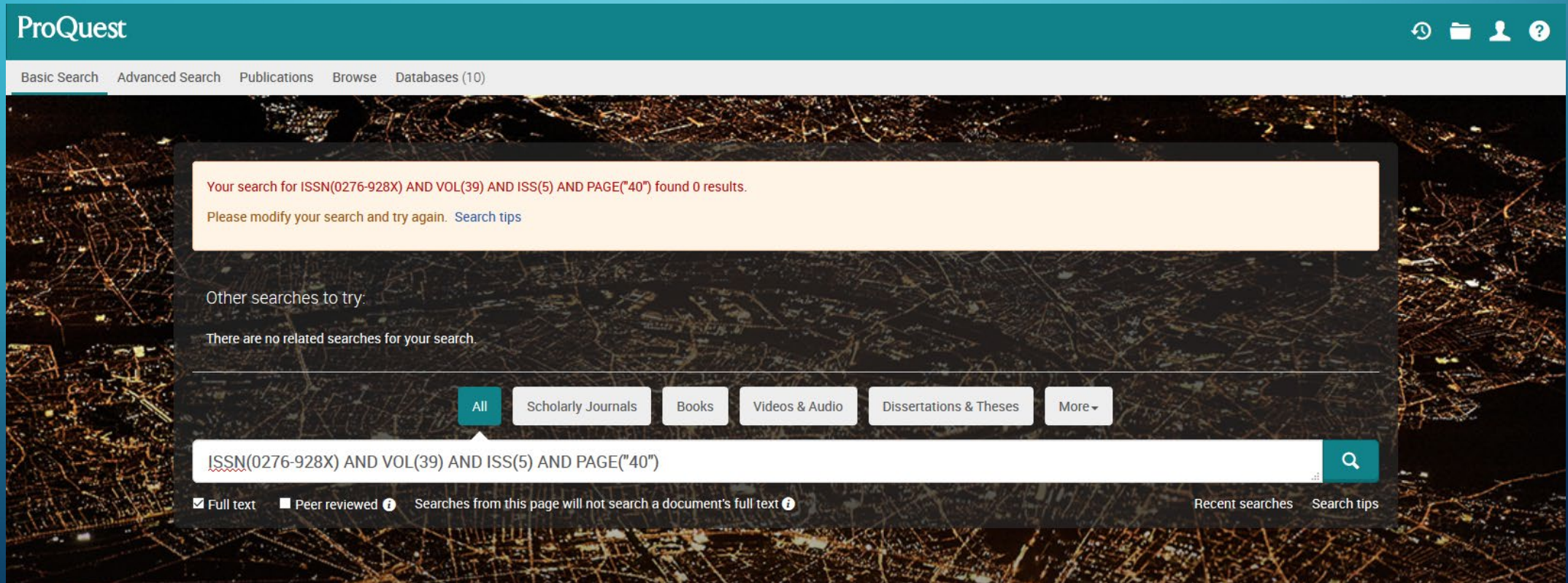
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Archaeology and Physical Anthropology in Oceania, July 1976, Vol.11(2), pp.106-137

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# MORE CONFUSION!



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ProQuest

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# TASK MANAGEMENT COMPLICATIONS

- Volume
  - Limited ability to fix in-house
  - Multiple vendors – no single interface
  - Vendors have long resolve times
  - Tickets have different priority levels
- 
- 

# OUR SOLUTION: TRACKING SPREADSHEET

- Gathers information about tickets from all vendors (and in-house!)
- Full control: include the data we think is important, and organize it in the way that works best for us
- Use formulas to automatically generate follow-up dates and gather statistics
- Serves as a knowledge base for future problems
- Provides statistical information on a variety of data points



# LIMITATIONS

- No way to automatically collect data – manual entry of each ticket
- Limited options for multi-person teams – shared workbooks are available, but do not function as well
- Processing power – can only include so much data in one spreadsheet



# ONWARDS: SPREADSHEET DEMO!

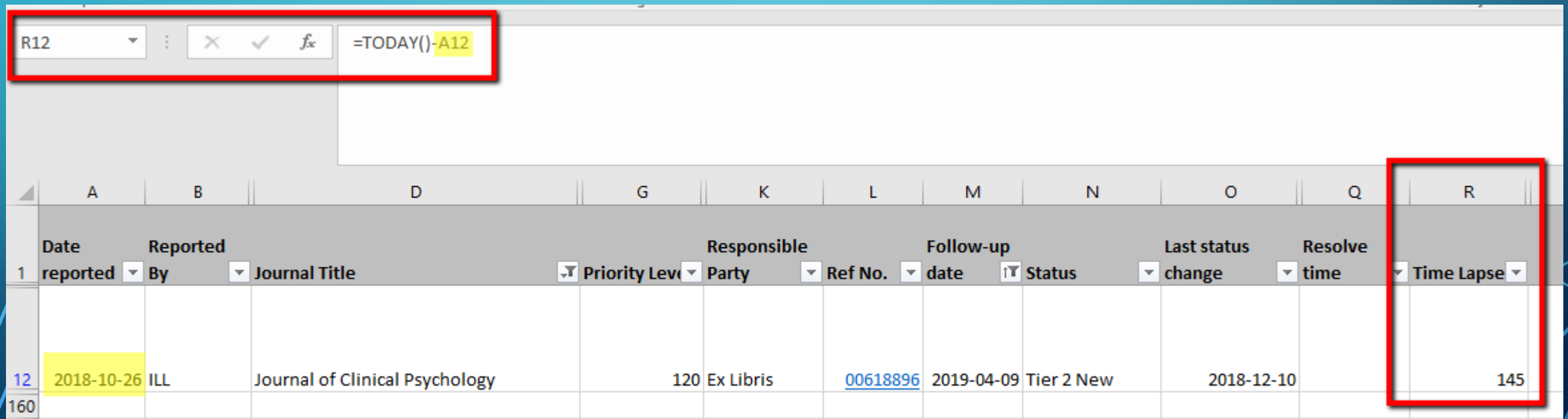
Follow along in a sample template:

<https://bit.ly/2JQOt6j>



# USEFUL FORMULAS

=TODAY()-[date] – calculate time lapsed since a particular date



	A	B	D	G	K	L	M	N	O	Q	R
1	Date reported	Reported By	Journal Title	Priority Level	Responsible Party	Ref No.	Follow-up date	Status	Last status change	Resolve time	Time Lapse
12	2018-10-26	ILL	Journal of Clinical Psychology	120	Ex Libris	<a href="#">00618896</a>	2019-04-09	Tier 2 New	2018-12-10		145



# USEFUL FORMULAS

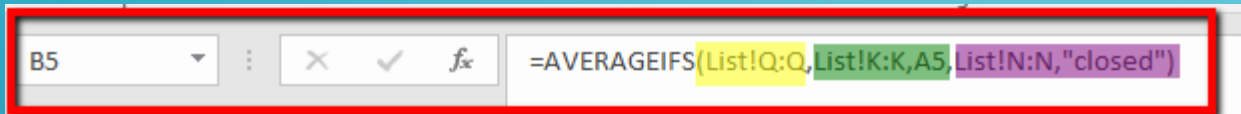
=IF(ISNUMBER(SEARCH())) – perform a logical test based on text in a cell (do X if present, do Y if not present)

- Used to calculate follow-up date based on status/priority
- Nest to perform multiple logical tests

	A	B	D	K	L	M	N	O	P
	Date reported	Reported By	Journal Title	Responsible Party	Ref No.	Priority Level	Follow-up date	Status	Last status change
10	2018-10-26	ILL	Journal of Clinical Psychology	Ex Libris	<a href="#">00618896</a>	120	2019-04-09	Tier 2 New	2018-12-10

# USEFUL FORMULAS

=COUNTIFS/AVERAGEIFS – count/average number of cells that meet certain conditions



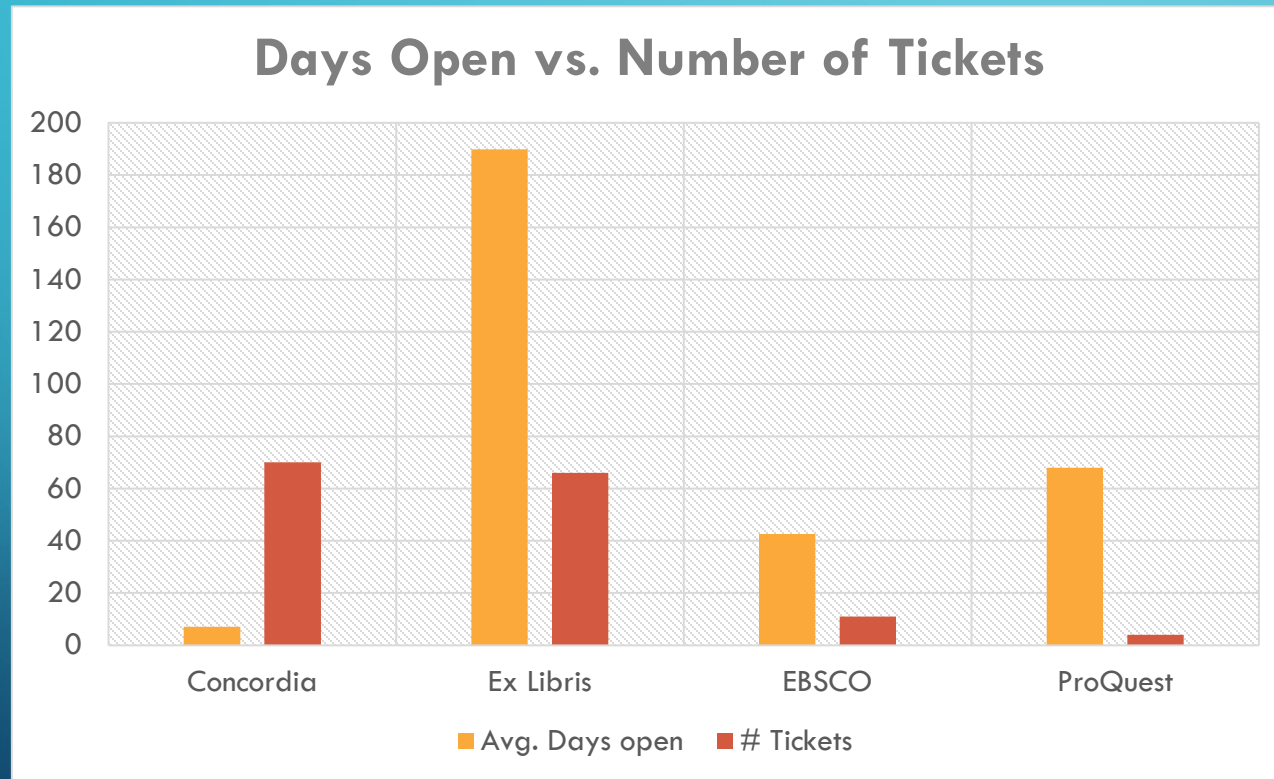
“List!” tells Excel to look in the Worksheet named List

					A	K	L	M	N	O	Q	
3												
4	Responsible Party	Avg. Resolution	Avg. Days open	# Tickets	1	Date reported	Responsible Party	Ref No.	Follow-up date	Status	Last status change	Resolve time
5	Ex Libris	185	196	66								
6	Concordia	7	7	70								
7	EBSCO	22	43	11								
8	ProQuest	115	68	4								
9	JSTOR	8		2								
10	Wiley	40		1								
11	Gale		86	2	43	2018-03-14	Ex Libris	00529058		Closed	2018-12-20	281
16					16							

Stats

List

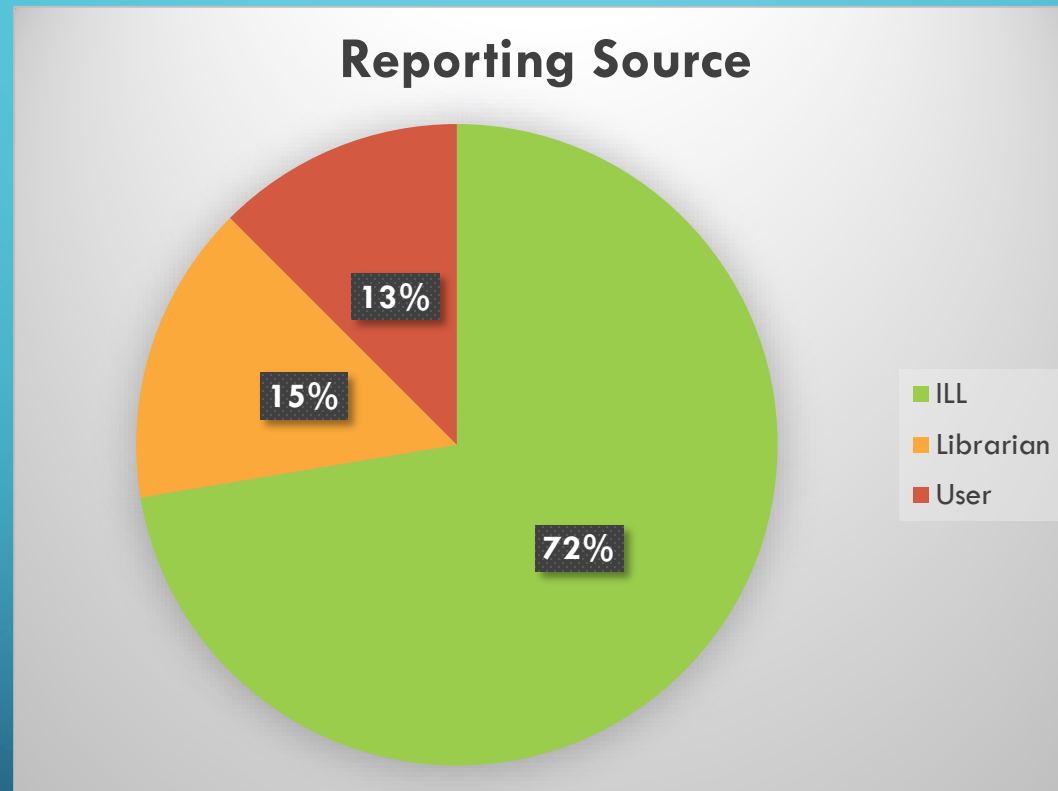
# STATS!



- Total # Tickets: 159
- Overall average days open: 89
- Longest time open: 771 days

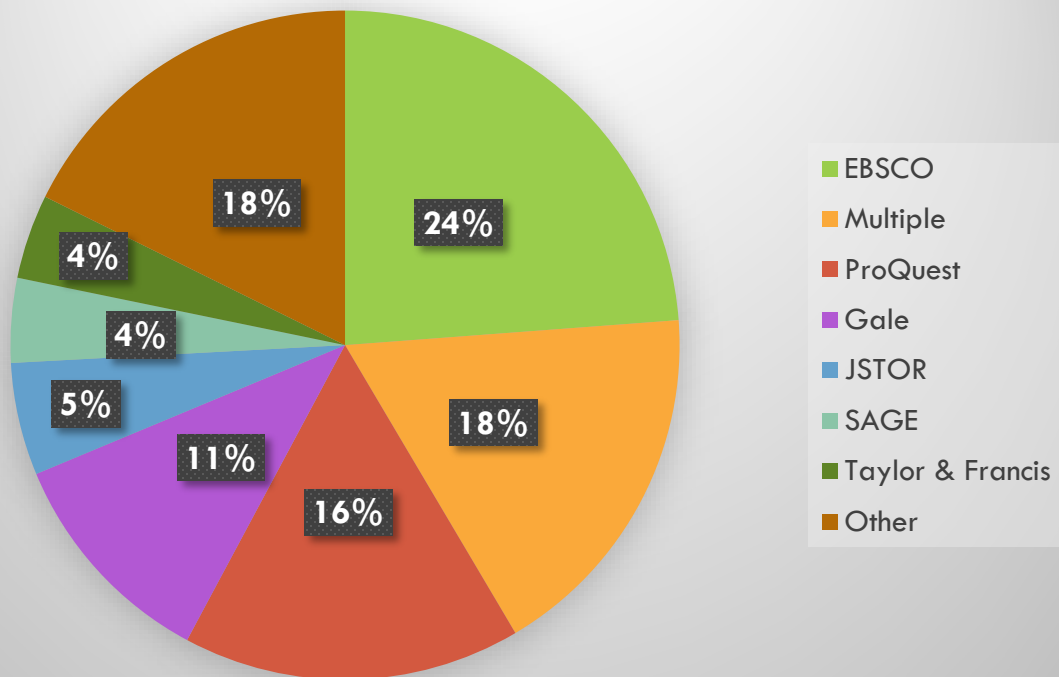


# STATS!



# STATS!

**Database Vendor**



## Databases with the most tickets:

- EBSCO Education Source
- ProQuest Central
- JSTOR

# FUTURE DIRECTIONS?

- Collect information on type of problem
- Investigate multi-user functionality
- Assign tracking numbers for internal tickets
- Integrate stats with annual database review



# NEW DEVELOPMENT: REPORT A PROBLEM FORM

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Please describe the problem:

If you received an error message, what did it say?

Please give us as much information about the item you are trying to access as you can. If possible, provide a citation to the resource.

If possible, please provide a link to the page where you encountered this problem.

OpenURL (staff use only)

[https://na01.alma.exlibrisgroup.com/view/uresolver/01ALLIANCE\\_CONC/openurl?rfr\\_id=info:sid/primo.exlibrisgroup.com-](https://na01.alma.exlibrisgroup.com/view/uresolver/01ALLIANCE_CONC/openurl?rfr_id=info:sid/primo.exlibrisgroup.com-)

# QUESTIONS?

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